

Budget

Delegate

Orientation



November
2011

Orientation Agenda

Part 1: General Information

- **Introductions**
- **PBNYC Jeopardy**
- **Introduction to the Budget Delegate Process and Project Development**
- **Q&A**

Part 2: Break into Committees

- **Meet Committee members**
- **District Trivia Game**
- **Closing and next steps**

What are Budget Delegates?

Budget delegates take the ideas developed by community members at the neighborhood assemblies and elsewhere, and turn them into concrete proposals to put on the final ballot.

Why “delegates”? Your neighbors have delegated to YOU the essential work of turning their ideas into reality. Your job is to respect the community’s will and make decisions for the good of the whole community.

Budget Delegate Timeline

(BD Guide Page 2)

Orientation

- Learn about the delegate process

Meeting 1 (November)

- Meet with Technical Experts
- Review project list and criteria

Meeting 2 (December)

- Prioritize project list
- Assign projects to delegates for site visits

Delegate site visits

- Assess projects and neighborhood need

Meeting 3 (January)

- Report back from site visits
- Pick projects for city agency review

Budget Delegate Timeline

(BD Guide Page 2)

Councilmember staff submits ideas to city agencies for review and pricing

**Meeting 4
(January)**

- **Start developing proposals with available feedback**

**Meeting 5
(February)**

- **Finalize proposals for neighborhood assemblies**

Second round neighborhood assemblies

**Meeting 6
(Feb/March)**

- **Finalize Ballot**

Budget Delegate Committees

(BD Guide Page 3)

Education

**Parks,
Environment &
Recreation**

Transportation

**Culture &
Community
Facilities**

Public Safety

Youth

ROLES AND RESPONSIBILITIES:

Budget Delegates (BD Guide Page 4)

Each Budget Delegate Will:

- **Participate** in regular committee meetings
- **Visit** proposed locations of projects
- Help **develop a proposal** for at least 1 project
- Keep the **community informed** on the committee's progress
- Help **present the proposals** at the 2nd Round Neighborhood Assemblies and the voting

ROLES AND RESPONSIBILITIES:

Council Member staff (BD Guide Page 4)

Council Member Staff Will:

- Provide a **facilitator** for each budget delegate committee
- **Schedule** meetings and **book meeting space** for all committees
- Provide **technical feedback** and **cost estimates** for projects
- Serve as a **liaison** between budget delegates and city agencies
- With District Committee, help **resolve conflicts**

ROLES AND RESPONSIBILITIES:

Committee Facilitators (BD Guide Page 4)

Committee Facilitators will:

- Help **facilitate meetings** and ensure that all delegates are able to participate
- Help **coordinate communication** between delegate committees and Councilmember staff
- **Connect** delegates with info and resources
- Ensure that **notes** are taken at each meeting and distributed to the committee

Committee Support People will NOT:

- **Make decisions** on projects or committee work
- **Write or present proposals.**

CAPITAL ELIGIBILITY

What kinds of things can be paid for with the Capital Budget?

(BD Guide Page 5-6)

What is the Capital Budget?

- ***The Capital Budget pays for things that last a long time and give larger benefits to the city that last beyond the time of purchase:***
 - Building a firehouse
 - Repaving a road or sidewalk
 - Building a new sewer

3-Part Capital Eligibility Test

- 1. Cost at least \$35,000**
- 2. Have a “useful life” of at least five years**
- 3. Involve the construction, reconstruction, acquisition, or installation or a physical public improvement**

1. COSTS AT LEAST \$35,000 (AND UNDER \$1M)

○Too Small

Buying furniture for an existing community center

○Too Big

Building a new community center

○Might work

Renovating a section of a building for community center uses

○Bundling

Multiple small items that work together as a “system” that adds up to over \$35,000 can be eligible (e.g. a computer lab)

2. HAVE A “USEFUL LIFE” OF AT LEAST FIVE YEARS

- Do Not Last Long Enough:
Laptops (Rolling “Laptop Carts” are eligible)
Some municipal vehicles

3. A PHYSICAL PUBLIC IMPROVEMENT

- **Work done in public space, buildings and land owned or controlled by the city.**
- Is it a “public purpose”? Ask: who owns the land?
 - Directly owned by the city or another government agency
YES
 - Owned by a non-profit with a relationship to the city
MAYBE
 - Owned by a religious congregation, co-op, membership organization or a private individual
NO

Non-City Capital Projects

- In some cases, land or buildings owned by non-profits that work with the city can qualify.
- There are extra City requirements for these projects
- Host non-profits will need to be approved by the city through an **application process that runs January-March** (in addition to getting enough votes in PB to get funded)
- **Committees should discuss a non-city capital project's feasibility with the Council Member's staff by the end of December.**

NOT ELIGIBLE (TRICKY EXAMPLES)

Things that seem like they might be capital...

- **Preventive maintenance programs**
 - Painting, carpet cleaning, supply replacement
- **Minor renovations**
 - Renovations that are limited to only painting, minor carpentry, etc. with no replacement of “building systems”
- **Supplies & inventory**
 - Printer cartridges, utensils, brochures
- **Bulk purchases of low-cost equipment**
 - Moveable trash cans, calculators, furniture

Let's Run Through a Few Examples...

- **"Community Center"**
- **"Trash Cans"**
- **"New traffic light or stop sign"**

Potential Obstacles

- An agency might not agree to begin a project until it is fully funded in the capital budget
- The agency has engineering or quality standards that the project might not meet or might significantly raise costs
- Getting an accurate cost estimate for a unique project
- Unforeseen conditions cause delay or increase the cost
- It might be unclear which agency should implement the project
- Might require expense funding for maintenance or maintenance agreement with a local organization

What should you do to make sure your projects will work?

Remain goal-oriented and be flexible

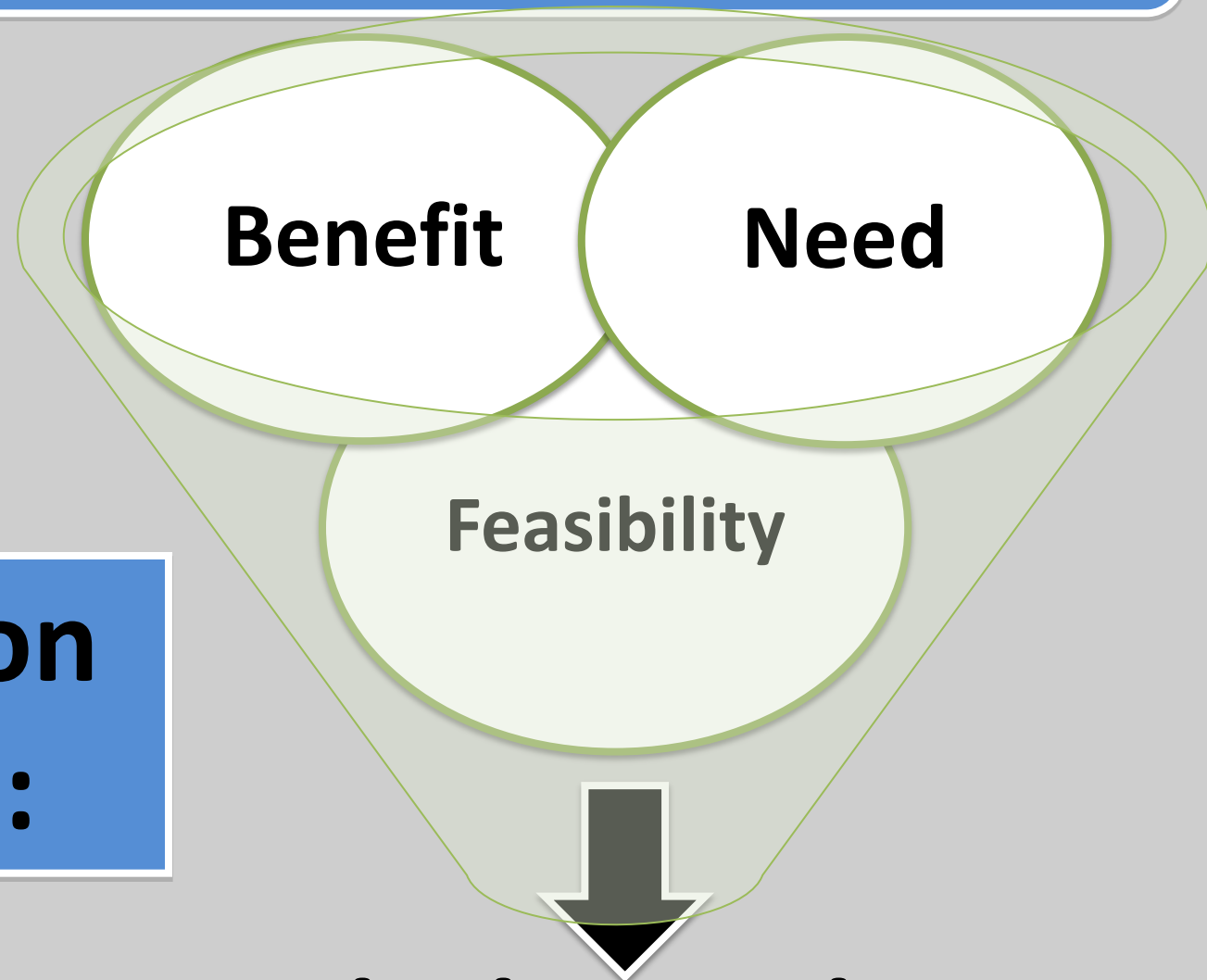
Consider bundling small projects and dividing up big ones

Seek potential project partners

Look for precedents

How will you prioritize project ideas?

(BD Guide Page 8)



**Evaluation
Criteria:**

Priority Projects

The End Goal: Project Proposals

(BD Guide Page 12)

Project Proposal Form

Project Name:
Location(s): (address, intersection, or landmark name)
Description: (1-2 sentences describing what the project involves)
Need: (Why is this project necessary? What local problems or needs does it address?)
Benefit: (Who will the project benefit? Which communities? How many people?)
Feasibility: (How have you verified that the project is eligible for funding and technically feasible?)
Potential Challenges? Other comments?
Estimated Cost:
Responsible City Agency or Organization:

Reality Check!

PB in Chicago, Year 1:

177 Project Ideas

142 Eligible Projects

**36 Proposals on
Ballot**

**14 Received
Funding**